



(/academics/faculty)

## CHARLES E. ROUNDS, JR.

Professor of Law

[Send a Message\(mailto:crounds@suffolk.edu\)](mailto:crounds@suffolk.edu)

### Biography

Lawyer, The First National Bank of Boston, 1977-83; Adjunct Instructor, 1978-83; Associate Professor of Law, 1983-86; Professor of Law, since 1986. Tenure Granted: 1990

### Professional Activities

Member, Preservation Easement Committee, Historic New England (formerly the Society for the Preservation of New England Antiquities); Fellow, American College of Trust and Estate Counsel (<http://www.actec.org/>); Former Counsel to The Franklin Foundation, by statute sole managing agent of a 200 year accumulation trust established under the will of Benjamin Franklin and now terminated. See *Franklin Foundation v. Attorney General*, 623 N.E. 2d 1109 (1993); Fiduciary litigation expert witness [numerous matters including *Phillips v. Washington Legal Found.* 118 S. Ct. 1925 (1998)]; Fiduciary consultant to trustees and agents, including attorneys-at-law. Massachusetts Lawyers Weekly (Emeritus Board Member).

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### PUBLICATIONS

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### BOOKS

**LORING AND ROUNDS: A TRUSTEE'S HANDBOOK, 120th Anniversary Special Mid-Year Supplement**  
**(/-/media/suffolk/documents/law/faculty/crounds\_trusteehandbook\_supplementinfo.pdf?la=en&hash=CF9909849C0AA5295F2960CD621F9C36F7AD673B)** (2019)

**LORING AND ROUNDS: A TRUSTEE'S HANDBOOK** (<https://lrus.woltersklower.com/store/product/loring-and-rounds-a-trustee-s-handbook-2019-edition/>) (2019)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (2018)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (2017)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (2016)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (2015)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (2014)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (2013)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (2012)

LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (Aspen, 2010 & Supp. 2011-)

### **A PRACTICAL GUIDE TO ESTATE PLANNING IN MASSACHUSETTS**

**(http://www.mcle.org/Email/FY12/051512/1970299B00.html?emcampaignID=12090&emuserID=36775)** (Massachusetts Continuing Legal Education, Charles E. Rounds, Jr. and Jon E. Steffensen eds., 2009) (with Jon E. Steffensen, co-editor)

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 LORING AND ROUNDS: A TRUSTEE'S HANDBOOK (Aspen, 2008)

LORING: A TRUSTEE'S HANDBOOK (Aspen, 2007)

I AND II A PRACTICAL GUIDE TO ESTATE PLANNING (2d ed., Jon E. Steffensen and Charles E. Rounds, Jr. eds., 2007) (Ethics

Editor)

LORING: A TRUSTEE'S HANDBOOK (Aspen, 2006)

LORING: A TRUSTEE'S HANDBOOK (Aspen, 2005)

LORING: A TRUSTEE'S HANDBOOK (Aspen, 2004)

FIDUCIARY LIABILITY OF TRUSTEES AND PERSONAL REPRESENTATIVES, BNA TAX MANAGEMENT PORTFOLIO 853 (2003)

LORING: A TRUSTEE'S HANDBOOK (Aspen, 2003)

LORING: A TRUSTEE'S HANDBOOK (Panel Pub., 2002)

LORING: A TRUSTEE'S HANDBOOK (Panel Pub., 2001)

I AND II A PRACTICAL GUIDE TO ESTATE PLANNING (Jon E. Steffensen and Charles E. Rounds, Jr. eds., 2000) (Ethics Editor).

LORING: A TRUSTEE'S HANDBOOK (Panel Pub., 2000)

LORING: A TRUSTEE'S HANDBOOK (Panel Pub., 1999)

LORING: A TRUSTEE'S HANDBOOK (Panel Pub., Centennial ed., 1998)

LORING: A TRUSTEE'S HANDBOOK (Little, Brown and Co., 1997)

LORING: A TRUSTEE'S HANDBOOK (Little, Brown and Co., 1996)

LORING: A TRUSTEE'S HANDBOOK (Little, Brown and Co., 1994)

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**Social Investing Threatens Public Pension Funds, Charitable Trusts and the Social Security Trust Fund [PDF]**

**(/-/media/suffolk/documents/law/faculty/crounds\_434\_pdftxt.pdf?la=en&hash=77F92E3E384A2997A4D744040E7CE0EF3995DCD3)**

**Close**, in PENSION FUND POLITICS: THE DANGERS OF SOCIALLY RESPONSIBLE INVESTING (American Enterprise Institute, John H. Entine ed., 2005)

Property Rights: The Hidden Issue of Social Security Reform, in SOCIAL SECURITY AND ITS DISCONTENTS (Cato Institute, Michael D. Tanner ed., 2004)

## ARTICLES

**[Arbitration Contracts Between Trustees and Their Investment Agents: A Warning Label \[PDF\],](#)**  
[\(/-/media/suffolk/documents/law/faculty/crounds\\_roundsfinal\\_5-29-2018\\_pdf.txt.pdf?la=en&hash=4646E5D1800A4E44D5FDB628BC050DBC9D7C0F07\)](#) 93 N. DAKOTA L. REV. 263 (2018)

**[“The Uniform Directed Trust Act,” \[PDF\]](#)**  
[\(/-/media/suffolk/documents/law/faculty/crounds\\_trustsestatesarticle\\_vol156no12\\_pdf.txt.pdf?la=en&hash=C3F94431B4D150FC77769335E77A12DC251C514E\)](#) *Trusts & Estates* (December 2017), at p. 24.

**[Is a Hungarian Trust a Clone of the Anglo-American Trust, or Just a Type of Contract?: Parsing the Asset-Management Provisions of the New Hungarian Civil Code \[PDF\]](#)**  
[\(/-/media/suffolk/documents/law/faculty/crounds\\_6\\_geo\\_mason\\_j\\_intl\\_com\\_l\\_153\\_2015\\_pdf.txt.pdf?la=en&hash=5B03CDC1594F751F045639ADBCC05CA6E3A23C9D\)](#), 6 GEO. MASON J. INT’L COM. L. 153 (2015) (with Istvan Illes)

**[Better Beach Books Felicia Chernesky \[PDF\]](#)**  
[\(/-/media/suffolk/documents/law/faculty/crounds\\_betterbeachbookssummer2015academicquestions\\_pdf.txt.pdf?la=en&hash=ADOE8929B7FE4FE34B9268C08E100E5E524EC66D\)](#) Published online: # Springer Science+Business Media New York, (2015)

**[The Massachusetts Uniform Trust Code: Context, Content, and Critique \[PDF\]](#)**  
[\(http://www.massbar.org/media/1555330/mlr%20v96%20n2.pdf\)](#), 96 MASS. L. REV. 27 (2014) (with Courtney J. Maloney)

**[Chinks in the Armor: Three Exceptions to the Uniform Trust Code’s 5-Year Understate Repose Provision Suggest That a Trustee May Not Be Home Free From Liability, TRUSTS & ESTATES 52 \(2013\)](#)**  
 This website uses cookies as well as similar tools and technologies to enhance your navigation, analyze site usage, and assist in our marketing efforts. (Visit our [Privacy Policy](#) to learn more.)  
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**[Old Doctrine Misunderstood, New Doctrine Misconceived: Deconstructing the Newly-Minted Restatement \(Third\) of Property’s Power of Appointment Sections \[PDF\]](#)**  
[\(/-/media/suffolk/documents/law/faculty/crounds\\_11\\_rounds-final\\_pdf.txt.pdf?la=en&hash=C5F55A1F9569F68587E21120464B013BDDE\)](#), 26 QUINNIPIAC PROB. L. J. 240 (2013)

**[Proponents of Extracting Slavery Reparations from Private Interests Must Contend with Equity’s Maxims](#)**

[\(/media/suffolk/documents/law/faculty/crounds\\_slaveryreparations\\_pdf.txt.pdf?](/media/suffolk/documents/law/faculty/crounds_slaveryreparations_pdf.txt.pdf?la=en&hash=F5FAEA58B652E6DCE0963994DFD9C780DB353981)

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***Bricks without Straw: The Sorry State of American Legal Education [PDF]*** ([http://0-](http://0-www.springerlink.com.library.law.suffolk.edu/content/y22417835813v362/fulltext.pdf)

[www.springerlink.com.library.law.suffolk.edu/content/y22417835813v362/fulltext.pdf](http://0-www.springerlink.com.library.law.suffolk.edu/content/y22417835813v362/fulltext.pdf)), 24 :2 ACADEMIC QUESTIONS (2011)

***You Can't Take It With You*** (reviewing Ray D. Madoff, *IMMORTALITY AND THE LAW: THE RISING POWER OF THE AMERICAN*

*DEAD* (<http://www.jdsupra.com/post/documentViewer.aspx?fid=c79e66b7-a324-42e2-bb20-614fa4d374e0>), 24 :1

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***Relief for IP Rights Infringement Is Primarily Equitable: How American Legal Education is Short-Changing the 21st Century***

***Corporate Litigator [PDF]*** ([/-/media/suffolk/documents/law/faculty/crounds\\_relief4iprightsingrinement\\_pdf.txt.pdf?](/media/suffolk/documents/law/faculty/crounds_relief4iprightsingrinement_pdf.txt.pdf?la=en&hash=38C287AF52C9C72654661715FCC7984848D0E7F9)

[la=en&hash=38C287AF52C9C72654661715FCC7984848D0E7F9](/media/suffolk/documents/law/faculty/crounds_relief4iprightsingrinement_pdf.txt.pdf?la=en&hash=38C287AF52C9C72654661715FCC7984848D0E7F9)), 26 SANTA CLARA COMPUTER & HIGH TECH L.J. 313 (2010)

***State Common Law Aspects of the Global Unwinding of the Madoff Ponzi Scheme and the Sub-Prime Mortgage Securitization***

***Debate: Buttredding the Thesis That Globalizing the American Law School Curriculum at the Expense of Instruction in Core***

***Common Law Doctrine Will Only Further Provincialize It [PDF]***

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[la=en&hash=58DC33252CBA3E12F04B1588922F4BC65DA6CE12](/media/suffolk/documents/law/faculty/crounds_roundsarticleaugust2009-2_pdf.txt.pdf?la=en&hash=58DC33252CBA3E12F04B1588922F4BC65DA6CE12)), 27 WIS. INT'L. L.J. 99 (2009)

*The Common Law is Not Just About Contracts: How Legal Education Has Been Short-Changing Feminism*, 43 U. RICH. L. REV.

1185 (2009)

***Lawyer Codes Are Just About Licensure, the Lawyer's Relationship With the State: Recalling the Common Law Agency,***

***Contract, Tort, Trust and Property Principles that Regulate the Lawyer-Client Relationship [PDF]***

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Sebastian V. Grassi, Jr's., *A Practical Guide to Drafting Irrevocable Life Insurance Trusts* (2d ed.), 27 MICH. PROB. & EST. PLAN. J.

27 (2007) (book review)

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***Publicly-Traded Open-End Mutual Funds in Common Law and Civil Law Jurisdictions: A Comparison of Legal Structures [PDF]***

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[la=en&hash=90FEAE32B97B33FC3512B09CAF7EB5B88F2AA9D6](/media/suffolk/documents/law/faculty/crounds_publicly-traded-open-end-mutual-funds_pdf.txt.pdf?la=en&hash=90FEAE32B97B33FC3512B09CAF7EB5B88F2AA9D6)), 3 NYU J. L. & BUS. 473 (2007) (with Andreas Dehio, Heidelberg, Germany) (with graphics)

***The Case for a Return to Mandatory Instruction in the Fiduciary Aspects of Agency and Trusts in the American Law School,***

*Together with a Model Fiduciary Relations Course Syllabus*, 18 REGENT U. L. REV. 251 (2006) See 20:6 PROB. & PROP., Nov./Dec. 2006 at pg. 64. See also Charles E. Rounds, Jr., **Bad Sociology, Not Law** (<http://www.popecenter.org/commentaries/article.html?id=2281>) (Jan. 4, 2010) (The John William Pope Center for Higher Education Policy). Charles E. Rounds, Jr., **Trivializing Law School** (<http://www.popecenter.org/commentaries/article.html?id=2329>) (April 1, 2010) (The John William Pope Center for Higher Education Policy)

**Why Democrats Should Embrace Personal Accounts [PDF]** ([/-/media/suffolk/documents/law/faculty/crounds\\_democratsoped\\_pdftxt.pdf?la=en&hash=490F392DAF20A30C12376CAB1E076FBDE5B62A2C](http://www.suffolk.edu/media/suffolk/documents/law/faculty/crounds_democratsoped_pdftxt.pdf?la=en&hash=490F392DAF20A30C12376CAB1E076FBDE5B62A2C)), 33 Mass. Law. Wkly. 2275 (2005)

**Reframing The Social Security Reform Debate As Ownership Versus Welfare [PDF]** ([/-/media/suffolk/documents/law/faculty/crounds\\_reframingssdebate\\_pdftxt.pdf?la=en&hash=54C3CF96A7199310D67F8FBFC366C9124DCEB0AA](http://www.suffolk.edu/media/suffolk/documents/law/faculty/crounds_reframingssdebate_pdftxt.pdf?la=en&hash=54C3CF96A7199310D67F8FBFC366C9124DCEB0AA)), (2005) See also Rounds, Letter to the Editor, Wall Street Journal, Monday, May 2, 2005, p. A19

**The Fiction of Social Security Bonds** (<https://mises.org/library/fiction-social-security-bonds>), Ludwig von Mises Institute (2005)

**No More Euphemisms (Addressing the misapplication of legal terminology by those participating in the social security privatization debate)** (<http://mises.org/daily/949>), Ludwig von Mises Institute (2002)

**A Legal and Operational Framework for the Privatization of Social Security** (<http://www.beaconhill.org/BHStudies/PolicyStudy302BordenRounds.pdf>), Beacon Hill Institute Policy Study (2002) (with Karl J. Borden)

**A Proposed Legal Regulatory, and Operational Structure for an Investment-Based Social Security System** (<http://www.cato.org/publications/social-security-choice-paper/proposed-legal-regulatory-operational-structure-investmentbased-social-security-system>), Cato Institute SSP No. 25 (2002) (with Karl J. Borden)

**Property Rights: The Hidden Issue of Social Security Reform** (<http://www.cato.org/publications/social-security-choice-paper/property-rights-hidden-issue-social-security-reform>), Cato Project on Social Security Privatization No. 19 (2000)

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**IOLTA: Interest Without Principle, No. 291 Policy Analysis** (<https://www.cato.org/publications/policy-analysis/iolta-interest-without-principle>), Cato Institute (1997) See also, Susan Perrilloux Billeaud, Comments, The Emperor Has No Clothes! IOLTA's Checkered Past Exposed; 30 CUMB. L. REV. 67 (2000) at 70-71; Marcia Coyle, Court revisits client account issue, National Law Journal, Dec. 2, 2001, pg. 1, col. 2; Ruling puts IOLTA plans in jeopardy, National Law Journal, Oct. 29, 2001, pg. 1, col. 5

*Social Investing, IOLTA and the Law of Trusts: The Settlor's Case Against the Political Use of Charitable and Client Funds*, 22 LOY.

U. CHI. L.J. 163 (1990) (reprinted 5 CONN. PROB. L.J. 25 (1989))

*The Vulnerability of Trust Assets to Attack by the Deceased Settlor's Creditors, by the Commonwealth Should It Seek Reimbursement for Medical Payments, and by the Spouse*, 73 MASS. L. REV. 67 (1988) (Cited in *Bongaards v Millen*, 55 Mass. App. Ct. 51, fn. 20 (2002))

**Protections Afforded to Massachusetts' Ancient Burial Grounds [PDF]**

**(/media/suffolk/documents/law/faculty/crounds\_73masslrev176\_pdftxt.pdf?la=en&hash=DFDB2DD13A28B9BDD43E6D94807B26CE12B591A4)**, 73 MASS. L. REV. 176 (1988) Cited in *Sanford v Vinal*, 552

N.E.2d 579, fn. 19, (Mass. App. Ct., 1990)

## OTHER PUBLICATIONS

**This Is Not Life, Liberty or Happiness-It's Tyranny**

**(http://online.wsj.com/article/SB10001424052702303425504577356182883072706.html?mod=googlenews\_wsj#articleTabs%3Darticle)**, WALL STREET JOURNAL, A14 ( 2012 ) (April 26, 2012)

**'First Do No Hurt' Should Apply to Our Regulators, Too**

**(http://online.wsj.com/article/SB10001424052970203518404577094454246433434.html)**, WALL STREET JOURNAL, A20 ( 2011 ) (Dec. 14, 2011)

**Please, No Lemmings (http://online.wsj.com/article/SB121332422338170659.html)**, WALL STREET JOURNAL, A14 ( 2008 ) (June 13, 2008)

**Social Security: An Overpriced Lottery Ticket (http://www.lexis.com/research/retrieve?\_m=9588237fe50afac14ee1bb1c496c239b&csvc=bl&cform=searchForm&fmtstr=FULL&docnum=1&startdoc=1&wchp=dGLbVzk-zSkAA&md5=1335242eafb68dbdea85648e11dba0c9)**, WALL STREET JOURNAL, A19 (2005) (May 2, 2005)

**Uniform Directed Trust Act Approved (http://www.wealthmanagement.com/estate-planning/uniform-directed-trust-act-approved)**, *Wealthmanagement.com*, August 03, 2017.

**the Suffolk University Cookie Policy (/about/mission-history/policies-procedures/internet-privacy-policy/cookie-policy)**, *Social Security Doublespeak*, 13 *The American Enterprise*, No. 5, p.35 (Sidebar), July/August 2002.

**Unraveling Social Security Privatization Doublespeak**, *Boston Business Journal*, v. 22, no.16. May 24-30, 2002, Op Ed. p. 55.

**Close**

**No More Euphemisms (http://www.mises.org/story/949)** (Addressing the misapplication of legal terminology by those

participating in the social security privatization debate). Posted May 7, 2002. **Ludwig von Mises Institute** (<http://www.mises.org/>).

## TESTIMONY BEFORE CONGRESS

- Testimony, Joint Economic Committee, U.S. Congress, Economically Targeted Investments (ETIs) May 18, 1995, ISBN 0-16-052347-8
- Testimony, Subcommittee on Commercial and Administrative Law, U.S. House of Representatives, Oversight Hearing on the Legal Services Corporation, June 26, 1996 (U.S. Congress House of Representatives Committee on the Judiciary). See generally, the Beacon Hill Institute's BHI Policy Studies.

## CONFERENCES AND PANELS

- **Moderator, Professional Seminar on Family Offices (Session II)—June 18, 2016**  
The American College of Trust and Estate Counsel (ACTEC) 2016 Summer Meeting  
The Westin Copley Place  
Boston, Massachusetts
- **Co-panelist, MassHealth Update 2014**  
Crowne Plaza Hotel, Newton, MA  
Friday, Oct. 24, 2014
- **Speech at the Center for Corporate Governance, Copenhagen Business School.**  
Sponsored by The Research Project on Industrial Foundations  
Jan. 10, 2014  
Copenhagen, Denmark
- **Trusts, Antitrust Provisions, and Powers of Appointment, Transfers and Tips**  
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Speech at the Merrimack Valley Conveyancers Association  
Oct. 24, 2013  
Andover, MA

**Close**



- **The Codification of Trust Law**

Presentation

Boston Trusts and Estates Consortium

Feb. 10, 2012, 12:00 noon-1:00 p.m.

One Federal St, 34th Floor

Boston, MA

- **The 5th Nordic Research Conference on Foundations**

Speaker and Panelist

September 17 and 18, 2009

Lund, Sweden

- **History of the Loring Handbook Going Back to 1898**

Inaugural Speaker "Authors Amongst Us" Series

Beacon Hill Civic Assoc., Hampshire House, Boston, MA

April 7, 2008

- Panelist, **Socially Responsible Investing**

U.S. Pensions Summit

The Homestead

Hot Springs, Virginia

Sept. 10-12, 2007

- Featured Speaker. **Annual Meeting**, Small Property Owners Assoc. (SPOA)

Cambridge, MA

March 20, 2007, 7:00 PM

- Panelist. **"Securing The Future Through Social Security Reform,"** Students for Saving Social security

Boston University, School of Education

Two Sherborn St

Boston, MA 02215

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- Moderator, Panel Discussion. **"Preserving Donor Intent,"** The Federalist Society.

The Corn **Close**

6 East 44th St. N.Y.C., N.Y.

Oct. 26, 2005, 7:00-8:30 PM

- Panelist. **"A Social Security Forum: Is Social Security Reform Necessary? "**  
 Merrimack Valley Estate Planning Council in Conjunction with the Massachusetts School of Law, Merrimack College and the Merrimack Valley Chamber of Commerce. The televised program received the *"Crystal Award of Excellence"* for projects that exceed industry standards in production and communication skills and the *"Silver Millennium Award."*  
 315 Turnpike Street  
 North Andover, MA 01845  
 Sep 12, 2005, 3-5 PM
- Panelist. **"Consumer Protection and Home Buying: The Business Behind the Business."**  
 Mass. Assoc. of Buyers Agents  
 120 Tremont St., Boston, MA 02108  
 June 2, 2005.  
 See, Boston Globe, Friday, June 3, 2005, Sec. E, p. 3 "Some real estate specialists see conflict in buyer-seller law", by Kimberly Blanton.
- Participant, **"Issues and Insight"**  
 Radio Program. Topic: *Social Security and Private Accounts*  
 KXCV-KRNW (Missouri)  
 April 2005.
- **The Benefits of Privatizing Social Security**  
 Suffolk University Law School Republicans  
 120 Tremont Street  
 Boston, MA  
 March 31, 2005
- **"Socially Responsible" Investing and Pension Funds: Welcome Reform or Fiduciary Nightmare?**  
 American Enterprise Institute for Public Policy Research  
 Wohlstetter Conference Center, AEI, Washington, D.C.  
 Panel II: SRI and Pension Fund Issues (Co-Presenter)  
 June 7, 2004  
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- **Advanced Topics in Trusts for Financial Professionals** (Co-Presenter)  
 The Boston Security Analysts Society, Inc.  
 Union Club Boston  
 Boston, Massachusetts  
 Feb. 13, 2003

- **Trusts: An Introduction to the Duties and Liabilities of Trustees** (Presenter)  
The Boston Security Analysts Society, Inc.  
Union Club of Boston  
Boston, Massachusetts  
Nov. 19, 2002
  
- **Fiduciary Responsibility: Recent Court Decisions of Particular Interest to Trustees, selected topics identified by CCC Members, and the Uniform Trust Code.** (Presenter)  
CCC Alliance Members' Meeting  
The Bay Tower Room  
Boston, Massachusetts  
Nov. 12, 2002
  
- **Social Security: False Consciousness and Crisis** (Transaction Publishers, 2002). *A Cato Institute Book Forum* (featuring the author, **John Attarian**, with comments by **Charles E. Rounds, Jr.**, Professor of Law, Suffolk University Law School and **Amitai Etzioni**, Professor of Sociology, George Washington University).  
Washington, D.C.  
Tuesday, October 22, 2002.
  
- **Trusts for Non-Lawyers: The Duties and Liabilities of Trustees** (Presenter)  
*Massachusetts Society of Certified Public Accountants Educational Foundation*  
Suffolk University Law School  
Boston, Massachusetts  
Wednesday, May 22, 2002
  
- **Center for Adoption Research at the University of Massachusetts** Member *Host Committee*, along with his wife Alicia.
  
- **Massachusetts 2001 Libertarian State Convention** (Speaker / Breakout Session)  
**Social Security Privatization**  
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Best Western Royal Plaza  
Marlborough, Massachusetts  
Saturday, February 24, 2001
  
- **Privatizing Social Security - Beyond the Theory** (<http://www.cato.org/events/privatizing-social-security-beyond-theory>) (**Close**)  
Martin Feldstein, et. al.  
Cato Institute

Washington, D.C.  
February 6-7, 2001

- **Drafting Special Needs Trusts** (Panelist)  
Massachusetts Bar Assoc.-CLE Seminar  
Worcester, Massachusetts  
December 6, 2000
- **Social Security Reform: Is Partial Privatization Really Risky?** (Debate Participant)  
The Federalist Society-Boston Lawyers' Division  
Boston, Massachusetts  
October 26, 2000
- **Demystifying the Rights, Duties and Responsibilities of a Fiduciary** (Speaker/ Break-Out Session)  
2000 Summit, 6th Annual Client Conference  
Capital Resource Advisors and Wellesley Group  
Palm Beach Gardens, Florida  
October 14, 2000
- **The Rights, Duties, and Liabilities of the Trustee** (Speaker)  
Next Generation Conference  
Boston, Massachusetts  
July 28, 2000
- **Drafting Special Needs Trusts** (Panelist)  
Massachusetts Bar Assoc.-CLE Seminar  
Boston, Massachusetts  
May 23, 2000
- **Affirmative Action** (Debate Moderator)  
The Federalist Society  
Boston, Massachusetts  
April 19, 2000
- **The Fundamental Principles of Agency and Trust Law**  
That Guide Those Who Invest for Others (Featured Speaker)  
The Boston Security Analysts Society

Boston, Massachusetts

March 7, 2000

- **The Rights, Duties, and Liabilities of the Trustee** (Featured Speaker)

The Boston Security Analysts Society

Boston, Massachusetts

November 9, 1999

- **Your Duties as a Retirement Board Members-Reflections on First Principles**(Speaker)

MACRS Refresher Comprehensive Overview Program for Board Members and Staff

Cape Cod, Massachusetts

June 5, 1999

- **Affirmative Action** (Debate Moderator)

Dr. Abigail Thernstrom, et. al.

The Federalist Society-Suffolk University Law School

Boston, Massachusetts

April 18, 1999

- **Prudent Diversification** (Speaker)

The Boston Estate and Business Planning Council

Boston, Massachusetts

March 26, 1999

- **The Disintegrating Erosion of Particular Exceptions** (Featured Speaker)

Massachusetts Association of Buyer Agents

Boston, Massachusetts

March 16, 1999

- **Are TOLPA Programs Constitutional?** (Debate Participant)

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(Rounds v. Morrison)  
the Cato Institute

Washington, D.C.

January 12, 1998

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- **The Common Law Rights of the Settlor and the Remaindermen and The Marginalization of the Law of Trusts in American Law Schools** (Luncheon Speaker)

Heirs Conference for Trust Beneficiaries  
 The Breakers  
 Palm Beach, Florida  
 January 3-4, 1997

- **Trials and Tribulations of Updating a Classic: Loring on Trusts** (Speaker)

Law Librarians of New England Fall Meeting  
 Boston, Massachusetts  
 November 17, 1995

- **Trustees' Duties, Responsibilities & Liabilities** (Speaker)

Sagamore Partners Workshop  
 Boston, Massachusetts  
 September 26, 1994  
 September 19, 1994

- **Topic: A Trustee's Handbook** (Speaker)

The Boston Probate & Estate Planning Forum  
 Boston, Massachusetts  
 September 14, 1994

- **Keynote Address** (Keynote Speaker)

Attorneys' Bar Assoc. of Florida Annual Meeting  
 Orlando, Florida  
 June 24, 1994

- **Oral Argument (Counsel for Plaintiff)**

The Franklin Foundation v. Attorney General, et. al.  
 Supreme Judicial Court of Massachusetts

Boston, Massachusetts  
 November 2, 1995

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- **Topic: Threat or Salvation** (Debate Participant)

Dr. Michael Greve, et. al.  
 The Federal Society  
 Boston, Massachusetts  
 February 11, 1993

- **Commencement Address** (Commencement Speaker)  
The Franklin Institute of Boston  
Boston, Massachusetts  
June 3, 1990

## Secondary School Information

**Phillips Academy** ([http://en.wikipedia.org/wiki/List\\_of\\_notable\\_Phillips\\_Academy\\_alumni](http://en.wikipedia.org/wiki/List_of_notable_Phillips_Academy_alumni)), Andover, Massachusetts (1960-1964); English-Speaking Union Exchange Scholarship to **Gresham's School** ([http://en.wikipedia.org/wiki/List\\_of\\_notable\\_Old\\_Greshamians](http://en.wikipedia.org/wiki/List_of_notable_Old_Greshamians)), Holt, Norfolk, England (1964-1965).

## Active Duty Military Service

U.S. Army (1969-1972).

## Honors and Awards

Dean Frederick A. McDermott Award <sup>1</sup>, 1982  
Judge Cornelius J. Moynihan Award <sup>2</sup>, 1989  
Judge Cornelius J. Moynihan Award <sup>2</sup>, 1993  
Judge Cornelius J. Moynihan Award <sup>2</sup>, 1994  
Dean Frederick A. McDermott Award <sup>1</sup>, 2006  
Professor of the Year Award <sup>1</sup>, 2019

## Additional Contact Information

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Professor Charles E. Rounds, Jr. [CRoundsJr@aol.com](mailto:CRoundsJr@aol.com) (<mailto:CRoundsJr@aol.com>)  
Suffolk University, Suffolk, MA 01901  
120 Tremont Street 617.367.1289 (H)  
Boston MA 02108-4977 Fax: 617.742.8285

**Close**

**Home Address:**

107 Mt. Vernon Street  
Boston, MA 02108

**Family:**

Spouse: Alicia S. Rounds

Sons: **Charles E. Rounds III (Chad)** (<http://dwkpc.net/>)

**Mark S. Rounds** (<http://www.ksquaredsearch.com/>)

**1. Dean Frederick A. McDermott Award** - awarded by the SULS Student Bar Association to an alumnus who has made significant contributions to the Suffolk Law Community.

**2. Judge Cornelius J. Moynihan Award** - awarded by the SULS Student Bar Association to a member of the law school faculty who exhibits great expertise as a classroom instructor.

**3. Professor of the Year Award** - Voted by the student body of Suffolk University Law School.

## Education

- BA, Columbia University
- JD, Suffolk University
- Certificate in German, Defense Language Institute (Monterey)

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**Office Hours**

573-8185

**[crounds@suffolk.edu](mailto:crounds@suffolk.edu)** (**<mailto:crounds@suffolk.edu>**)

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## Courses Taught

Drafting Wills and Trusts

Agency

Trusts

Legal Structures of Mutual Funds in Civil Law and Common Law Jurisdictions

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**Contact Us**

**1-617-573-8000 (tel:6175738000)**

**73 Tremont Street (https://goo.gl/maps/2FDom7g5xqp)**

**Boston, MA 02108 (https://goo.gl/maps/2FDom7g5xqp)**

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